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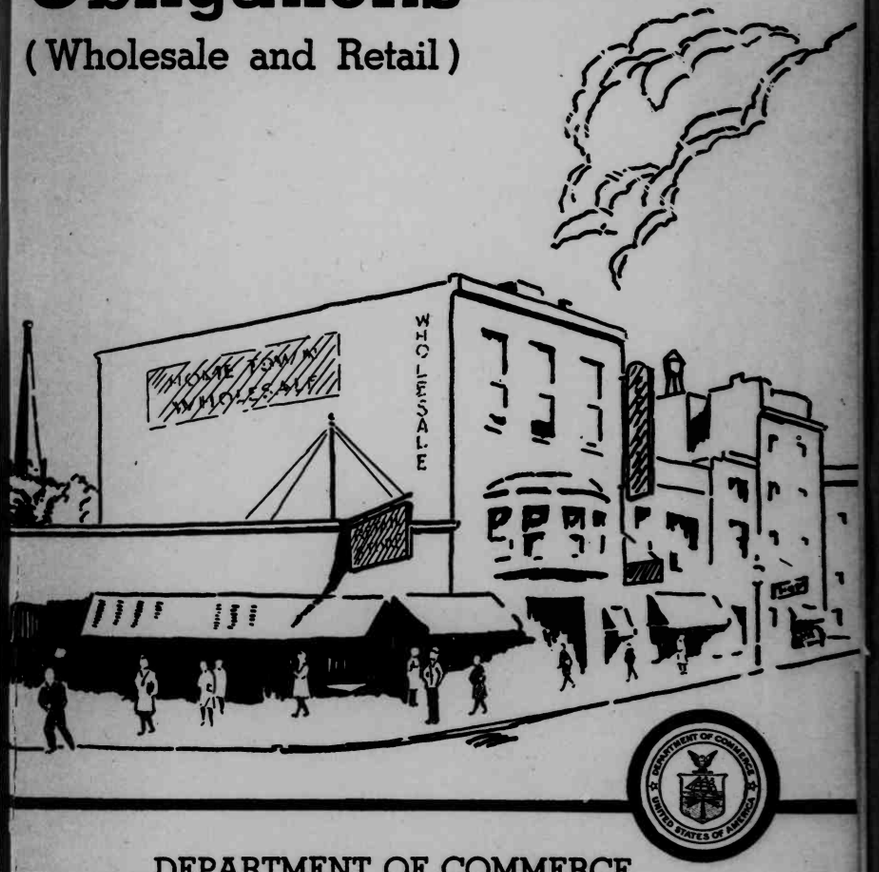

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Business Leasehold Obligations

(Wholesale and Retail)

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Foreword

This study is the result of a request addressed to Hon. Wayne C. Taylor, Under Secretary of Commerce, by Senator James E. Murray, Chairman, Senate Small Business Committee. In his letter, Senator Murray quoted testimony before the committee, in which he asked Donald Nelson, Chairman, War Production Board, for an estimate of the amount of business leases and mortgages and the commitments involved. In replying, Mr. Nelson expressed his opinion that the Department of Commerce would be best able to develop the information.

As a contribution to this broad subject, a study has been completed on "Business Leasehold Obligations," based upon reports from a substantial number of retailers and wholesalers. This report contains new information on the proportion of retail and wholesale properties owned and rented, the number of rented premises which were leased, and the number of years the leases had yet to run as of June 1943.

The Bureau of Foreign and Domestic Commerce, in collaboration with the Bureau of the Census, prepared a questionnaire which was mailed to reporting concerns cooperating in the Census Current Reporting Service. Approximately 30,000 current reporters in the independent retail field and 3,500 wholesale distributors were contacted in this way. Replies were received from 20,742 retailers and 2,658 wholesalers. Results comprise valuable data to all those seeking information on the number and kind of leases held by retailers and wholesalers.

The Bureau offers this study as part of its broad program in behalf of small business, with particular emphasis on providing needed information to the realtors of the Nation. Statements in the preface express this Bureau's concept of the importance of small business in our national economy.

The present study was prepared under the general direction of Wilford White, Acting Chief, Division of Regional Economy, and the specific direction of William Shepherdson, Chief, Small Business Unit. The text was written by C. S. Logsdon, Regional Economist, Regional Research Unit. Assistance was given by the National Association of Real Estate Boards, Herbert U. Nelson, Executive Vice President, and by members of the Business Census Division of the Bureau of the Census.

AMOS E. TAYLOR, *Director.*

MARCH 1944.

Preface

Small Business and Its Place

Millions of business establishments form the network of our free enterprise system. That this network exists and functions smoothly is due to the myriad cross lanes operated by small enterprises. Thus, small business is an inseparable part of our national economy, of our way of life, and of democracy itself.

At the community level, people are coming to recognize that the well-being of any town or city is determined by the well-being of all its business establishments. Furthermore, the concept that without the existence of smaller concerns big business would find it difficult, if not impossible, to prosper and to maintain freedom of action is no longer being challenged. It is being accepted as a statement of fact.

Because the term "small business" is a relative one, there always will be differences of opinion as to where smallness ends and bigness starts. Many persons have attempted to define small business, but none of the definitions have been satisfactory under all circumstances. For statistical purposes only, the Department considers certain concerns as small establishments. They are (*a*) manufacturing plants with 100 employees or less; (*b*) wholesale establishments (selected trades, services, and limited function wholesalers) with less than $200,000 annual net sales volume; (*c*) retail stores with annual net sales or receipts of less than $50,000; and (*d*) service establishments, hotels, places of amusement, and construction establishments, with annual net sales or receipts of less than $50,000.

When establishments, as reported in the Business Census of 1939, are segregated according to the above statistical definition the data are as follows: Numerically 92.5 percent of all establishments are small concerns. These concerns employ 44.8 percent of the total personnel.

However, the definition which the Department prefers does not lend itself to tabulation. It regards a business as small when the concern cannot afford to buy, with some degree of regularity and consistency, the kind of research service and management advice, engineering, marketing, economic, legal, and financial counsel which a big business procures out of its substantial resources.

This study of "Business Leasehold Obligations," wholesale and retail, it is hoped will provide realtors and other interested small business managements with information which otherwise would be unavailable to them.

The findings in the study are qualitative only and are not intended to indicate statistical trends. Limitations of sample size and coverage make it inadvisable to apply the derived percentages for the evaluation of local or specific leasehold conditions or to project numerical totals on a national basis without regard to other pertinent conditions. Within these restrictions, the survey is inclusive enough to reveal general conditions and to throw light on a field that has had little research.

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PART I—SUMMARY

ALL REPORTING ESTABLISHMENTS

Fifty-eight percent of all the reporting retail establishments rent their business premises, and of those who rent, slightly more than one-half have leases. Over half of these leases expire within a 1- to 5-year period, and nearly one-third terminate within a year. Only 12 percent have more than 5 years to run.

Fifty-six percent of all the reporting wholesale distributors rent their business premises, and of those who rent, two-thirds have leases. Approximately one-half of the leases expire within from 1 to 5 years, 40 percent terminate within 1 year, and about 10 percent have a life of more than 5 years.

INDEPENDENT RETAILERS

Ownership Versus Rental of Business Premises

Kind of business.—Renting is most common among apparel, sporting goods, and jewelry stores. It is least prevalent among general and farm and garden supply stores.

City size.—There is a tendency for the percentage of rented stores to increase with city size until 500,000 population is reached. Above this point no such influence is exerted.

Business size.—There appears to be no very significant connection between the size and the nature of retail occupancy. The only group in which ownership is more common than rental is that with annual sales of less than $10,000; and, even here, the difference is very slight.

Geographical location.—Renting is most common on the Pacific coast and least among the Middle Atlantic States. No appreciable departure from the average appears elsewhere.

Prevalence of Leases Among Independent Retailers Renting Their Premises

Kind of business.—Two kinds of business range far from the average. Over 90 percent of the department stores renting their premises have leases while only about 25 percent of the general stores do.

City size.—Leasing is more common in the largest cities, while nearly two-thirds of the small-town stores operate without a contract.

Business size.—Leasing is also more general among large stores. Only slightly more than 25 percent of the very small retailers lease, as contrasted with nearly 90 percent of those in the million-dollar sales class.

Geographical location.—Leases appear to be most numerous among renters in the Middle Atlantic States and least in New England. The other regions are not far from the national average.

Expiration Date of Leases Held by Establishments Renting Their Premises

Kind of business.—Department stores are the sole significant departure from the general averages for lease expiration. Only 7 percent of the leases held by this kind of retail business have less than 1 year to run. About equal proportions of their leases terminate from 1 to 5 years and from 5 years on.

City size.—City size seems to have no other appreciable influence on the length of leases except that cities of over 500,000 have the smallest percentage expiring within 1 year and the largest with more than 5 years to run.

Business size.—There is no significant effect of business size upon the prevalence of leases that have from 1 to 5 years to run. On the other hand, as business size increases, the less-than-1-year-to-run group becomes less common and leases having more than 5 years of life become more common.

Geographical location.—Leases terminating in less than a year are more common in the Middle Atlantic States than anywhere else and are found least frequently in New England. The latter region is appreciably above the average for leases having an expiration date extending beyond 5 years.

WHOLESALE DISTRIBUTORS

Ownership versus Rental of Business Premises

Kind of business.—Over 90 percent of the jewelry wholesalers rent their business premises, and distributors of clothing and furnishings (except shoes) have an appreciably high rental tendency. Lumber and building material wholesalers are least likely to rent.

Business size.—A distinct trend away from rental and toward ownership of premises accompanies an increase in sales volume.

Geographical location.—There are no marked differences in rental by sections of the country. By no very great margin, the wholesalers in the Mountain States are least likely to rent and those on the Pacific coast most likely.

Prevalence of Leases Among Wholesalers Renting Their Premises

Kind of business.—As in retailing, the kind of business has an appreciable effect upon the prevalence of leases. Less than 33 percent of the renting confectionery distributors have leases, while more than 80 percent of jewelry, paper, lumber, and furniture wholesalers have such contracts.

Business size.—A very definite tendency is observed among renting wholesalers to increase the use of leases as the volume of sales grows.

Geographical location.—New England is the only significant subaverage region in using leases. It may be noted that the Middle Atlantic States are well above the average percentage.

Expiration Date of Leases Held by Wholesalers Renting Their Premises

Kind of business.—The drug, liquor, and hardware lines appear to have the fewest leases expiring within 1 year. In fact, they stand above other kinds of business in the frequency of expiration within the 1- to 5-year period.

Business size.—There is a distinct trend among larger firms to hold a smaller proportion of leases with less-than-1-year expiration and a larger proportion of those not terminating for at lease 5 years.

Geographical location.—No very notable influence of location is found on the length of wholesale leases beyond the prominence of within-1-year expiration in the Middle Atlantic States and their relative infrequency in New England and the Mountain States.

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PART II—THE RESULTS

SECTION 1. INDEPENDENT RETAILERS

OWNERSHIP VERSUS RENTAL OF PREMISES

Kind of business.—Of all the reporting stores 58.4 percent rent their premises. When the reporting stores are segregated by kinds of business, rental of premises is more than average among the apparel group, department stores, eating and drinking places, liquor stores, drug stores, sporting goods stores, and jewelers. Much less than average rental is characteristic of general stores, farm and garden supply stores, and in the lumber-building-hardware group.

TABLE 1.—*Independent retail establishments—Ownership versus rental of premises, June 1943*

[By kind of business]

Kind of business	Total number of establishments reporting		Percent of total number of premises	
	Number	Percent	Owned by occupants	Rented by occupants
United States total [1]	20,742	100	41.6	58.4
Department stores	228	100	30.7	69.3
Food group	4,425	100	49.3	50.7
Eating and drinking places	1,604	100	28.0	72.0
General stores	1,550	100	72.5	27.5
Liquor stores	233	100	28.8	71.2
Florists	206	100	41.3	58.7
Filling stations	683	100	45.2	54.8
Farm and garden supply	125	100	64.0	36.0
Drug stores	2,548	100	27.4	72.6
Dry goods and general merchandise	606	100	43.7	56.3
Apparel group	2,217	100	17.5	82.5
Sporting goods stores	96	100	19.8	80.2
Jewelry stores	704	100	21.2	78.8
Automotive group	1,288	100	41.0	59.0
Furniture-household-radio group	1,166	100	37.0	63.0
Lumber-building-hardware group	2,756	100	60.6	39.4
Other kinds of business not segregated	307	100	39.7	60.3

[1] 34 States only. See pt. III, sec. I.

City size.—The size of city appears to be more influential than sales volume in determining the tendency toward store ownership. Nearly half of the reporting stores in towns of less than 10,000 rent their premises, while in cities of over 500,000 over two-thirds are renters. This trend follows through in communities of intermediate size.

TABLE 2.—*Independent retail establishments—Ownership versus rental of premises, June 1943*

[By city size]

Size of city (based on 1940 population)	Total number of establishments reporting		Percent of total number of premises	
	Number	Percent	Owned by occupants	Rented by occupants
United States total [1]	20,742	100	41 6	58. 4
500,000 or more	2,427	100	30.7	69.3
100,000 to 500,000	3,110	100	29.3	70.7
10,000 to 100,000	6,923	100	35.4	64.6
Less than 10,000	8,282	100	54.6	45.4

[1] 34 States only. See pt. III, sec. I.

Business size.—There is no direct relationship between the size of business and ownership except at the extremes. Very small stores are more likely to be owned, whereas the very large ones are generally rented.

TABLE 3.—*Independent retail establishments—Ownership versus rental of premises, June 1943*

[By business size]

Total annual sales, business size group (based on 1939 sales)	Total number of establishments reporting		Percent of total number of premises	
	Number	Percent	Owned by occupants	Rented by occupants
United States total [1]	20,742	100	41 6	58 4
$1,000,000 and over	132	100	35.6	64 4
$500,000 to $999,999	330	100	33.0	67.0
$300,000 to $499,999	508	100	38.4	61.6
$200,000 to $299,999	613	100	45.2	54 8
$100,000 to $199,999	1,849	100	44.1	55.9
$50,000 to $99,999	3,575	100	41.0	59.0
$30,000 to $49,999	3,848	100	37.5	62.5
$20,000 to $29,999	3,180	100	38.1	61.9
$10,000 to $19,999	4,110	100	42.2	57.8
Under $10,000	2,597	100	51.5	48.5

[1] 34 States only. See pt. III, sec. 1.

Geographical location.—A considerable variation in the extent of rented premises appears among the geographical regions of the United States. The largest percentage of retailers renting their premises is found on the Pacific coast and the smallest in the Middle Atlantic States. Store tendency exceeds the national average of 58.4 percent in New England, the South Atlantic region, the East South Central section, the Mountain States and the Pacific coast region.

TABLE 4.—*Independent retail establishments—Ownership versus rental of premises, June 1943*

[By geographical location]

Region	Total number of establishments reporting		Percent of total number of premises	
	Number	Percent	Owned by occupants	Rented by occupants
United States total [1]	20,742	100	41.6	58.4
New England	2,255	100	39.9	60.1
Middle Atlantic	1,722	100	57.7	42.3
East North Central	5,538	100	44.5	55.5
West North Central	2,252	100	43.9	56.1
South Atlantic	800	100	35.1	64.9
East South Central	239	100	41.0	59.0
West South Central	1,483	100	43.4	56.6
Mountain	2,086	100	40.7	59.3
Pacific	4,367	100	32.4	67.6

[1] 34 States only. See pt. III, sec. 1.

PREVALENCE OF LEASES

Kind of business.—Some 52.1 percent of the retailers, reporting that they rent their premises, have lease contracts. Of all the kinds of retail businesses, department stores are, by far, the most frequent lessees (93.7 percent), but eating and drinking places, filling stations, drug stores, the apparel group, sporting goods stores, jewelry stores, and the automotive group are above the average.

TABLE 5.—*Independent retail establishments—Prevalence of leases, June 1943*

[By kind of business]

Kind of business	Premises rented by occupants		Percent of total premises rented by occupants	
	Number	Percent	Without lease	With lease
United States total [1]	12,106	100	47.9	52.1
Department stores	158	100	6.3	93.7
Food group	2,242	100	65.2	34.8
Eating and drinking places	1,155	100	34.8	65.2
General stores	427	100	74.7	25.3
Liquor stores	166	100	54.8	45.2
Florists	121	100	49.6	50.4
Filling stations	374	100	29.7	70.3
Farm and garden supply	45	100	53.3	46.7
Drug stores	1,851	100	46.0	54.0
Dry goods and general merchandise	341	100	53.4	46.6
Apparel group	1,829	100	32.3	67.7
Sporting goods stores	77	100	41.6	58.4
Jewelry stores	555	100	42.7	57.3
Automotive group	760	100	47.2	52.8
Furniture-household-radio-group	735	100	52.0	48.0
Lumber-building-hardware group	1,085	100	55.2	44.8
Other kinds of business not segregated	185	100	45.9	54.1

[1] 34 States only. See pt. III, sec. 1.

City size.—A trend similar to that observed in business size is found when the reporting independent retailers are classified by size of city. For example, slightly more than a third of those in towns of less than 10,000 have leases whereas the proportion rises, even if somewhat unevenly, to over two-thirds in cities exceeding 500,000 population.

TABLE 6.—*Independent retail establishments—Prevalence of leases, June 1943*

[By city size]

Size of city (based on 1940 population)	Premises rented by occupants		Percent of total premises rented by occupants	
	Number	Percent	Without lease	With lease
United States total [1]	12,106	100	47.9	52.1
500,000 or more	1,682	100	31.4	68.6
100,000 to 500,000	2,198	100	49.2	50.8
10,000 to 100,000	4,466	100	41.6	58.4
Less than 10,000	3,760	100	62.0	38.0

[1] 34 States only. See pt. III, sec. I.

Business size.—52.1 percent of the retailers, reporting that they rent their premises, have lease contracts. Size of business appears to have a telling effect since but 38 percent of the stores with less than a $20,000 annual volume have leases. This proportion increases rather consistently with sales until we find leases in use in nearly 90 percent of the rented stores in the million-dollar and over class.

TABLE 7.—*Independent retail establishments—Prevalence of leases, June 1943*

[By business size]

Total annual sales business size group (based on 1939 sales)	Premises rented by occupants		Percent of total premises rented by occupants	
	Number	Percent	Without lease	With lease
United States total [1]	12,106	100	47.9	52.1
$1,000,000 and over	85	100	11.8	88.2
$500,000 to $999,999	221	100	17.2	82.8
$300,000 to $499,999	313	100	25.6	74.4
$200,000 to $299,999	336	100	30.4	69.6
$100,000 to $199,999	1,033	100	29.7	70.3
$50,000 to $99,999	2,109	100	36.0	64.0
$30,000 to $49,999	2,405	100	45.1	54.9
$20,000 to $29,999	1,969	100	51.4	48.6
$10,000 to $19,999	2,376	100	62.4	37.6
Under $10,000	1,259	100	73.2	26.8

[1] 34 States only. See pt. III, sec. I.

Geographical location.—On the basis of location, leases are least common among renting retailers in New England and most numerous in the Middle Atlantic States. Along with the latter region, leases are above average in the East North Central, East South Central, and Pacific States.

TABLE 8.—*Independent retail establishments—Prevalence of leases, June 1943*

[By geographical location]

Region	Premises rented by occupants		Percent of total premises rented by occupants	
	Number	Percent	Without lease	With lease
United States total [1]	12,106	100	47.9	52.1
New England	1,355	100	60.1	39.9
Middle Atlantic	728	100	29.0	71.0
East north central	3,072	100	45.4	54.6
West north central	1,264	100	54.5	45.5
South Atlantic	519	100	52.2	47.8
East south central	141	100	39.0	61.0
West south central	839	100	53.6	46.4
Mountain	1,236	100	51.7	48.3
Pacific	2,952	100	43.1	56.9

[1] 34 States only. See pt. II, sec. I.]

EXPIRATION DATE OF EXISTING LEASES

Kind of business.—Some 31.2 percent of the retailers holding leases report that their contracts expire within 1 year; 56.4 percent report expirations within from 1 to 5 years, and 12.4 percent more than 5 years. The length of leases varies widely by kind of business. Department stores have the least proportion terminating within a year and filling stations the most. Department stores have the largest percentage running for more than 5 years and liquor stores the smallest. Within these extremes, and excepting filling stations, 1- to 5-year expiration is the most common type in every kind of retail business.

TABLE 9.—*Independent retail establishments—Expiration date of leases, June 1943*

[By kind of business]

Kind of business	Premises under lease by occupants		Percent of premises under lease by occupants—lease expires		
	Number	Percent	Within 1 year	1 to 5 years	More than 5 years
United States total [1]	6,308	100	31.2	56.4	12.4
Department stores	148	100	7.4	47.3	45.3
Food group	780	100	37.1	54.5	8.4
Eating and drinking places	753	100	33.5	55.6	10.9
General stores	108	100	29.6	50.9	19.5
Liquor stores	75	100	38.7	58.7	2.6
Florists	61	100	41.0	55.7	3.3
Filling stations	263	100	46.8	39.9	13.3
Farm and garden supply	21	100	33.3	57.2	9.5
Drug stores	999	100	24.8	62.8	12.4
Dry goods and general merchandise	159	100	29.6	58.5	11.9
Apparel group	1,238	100	24.3	61.3	14.4
Sporting goods stores	45	100	22.2	68.9	8.9
Jewelry stores	318	100	35.2	54.7	10.1
Automotive group	401	100	43.9	49.1	7.0
Furniture-household-radio group	353	100	30.9	58.1	11.0
Lumber-building-hardware group	486	100	32.5	53.1	14.4
Other kinds of business not segregated	100	100	37.0	53.0	10.0

[1] 34 States only. See pt. III, sec. I.

City size.—No particularly conspicuous exceptions to the averages for all stores appear as a result of differences in city size.

TABLE 10.—*Independent retail establishments—Expiration date of leases, June 1943*

[By city size]

Size of city (based on 1940 population)	Premises under lease by occupants		Percent of premises under lease by occupants—Lease expires—		
	Number	Percent	Within 1 year	1 to 5 years	More than 5 years
United States total [1]	6,308	100	31.2	56.4	12.4
500,000 or more	1,154	100	39.3	51.6	9.1
100,000 to 500,000	1,117	100	29.7	55.5	14.8
10,000 to 100,000	2,607	100	28.4	58.6	13.0
Less than 10,000	1,430	100	30.7	57.2	12.1

[1] 34 States only. See pt. III, sec. I.

Business size.—The term of the unexpired portion of the lease varies considerably with the size of the enterprise. Leases with less than a year to run from the date of the survey (June 1943) are more common among the small stores. This proportion declines rather directly as size increase and only about one-fifth of the stores in the $1,000,000 or larger group had leases with less than a year to run. An opposite trend is observed for the more-than-5-year variety. Business size seems to have no significant effect upon the proportion of stores having lease expirations from 1 to 5 years away.

TABLE 11.—*Independent retail establishments—Expiration date of leases, June 1943*

[By business size]

Total annual sales business size group (based on 1939 sales)	Premises under lease by occupants		Percent of premises under lease by occupants—Lease expires—		
	Number	Percent	Within 1 year	1 to 5 years	More than 5 years
United States total [1]	6,308	100	31.2	56.4	12.4
$1,000,000 and over	75	100	18.7	42.7	38.6
$500,000 to $999,999	183	100	26.8	49.7	23.5
$300,000 to $499,999	233	100	26.2	48.9	24.9
$200,000 to $299,999	234	100	24.4	54.3	21.3
$100,000 to $199,999	726	100	20.5	61.0	18.5
$50,000 to $99,999	1,349	100	25.6	60.8	13.6
$30,000 to $49,999	1,320	100	30.5	59.7	9.8
$20,000 to $29,999	957	100	35.1	56.1	8.8
$10,000 to $19,999	894	100	42.7	51.4	5.9
Under $10,000	337	100	50.4	44.5	5.1

[1] 34 States only. See pt. III, sec. I.

Geographical location.—An examination of the effect of location reveals that stores in the Middle Atlantic region have the most leases expiring within a year and those in New England the least. Conversely, the Middle Atlantic retailers have the smallest proportion running out in from 1 to 5 years. No other important deviation from the averages appear.

TABLE 12.—*Independent retail establishments—Expiration date of leases, June 1943*

[By geographical location]

Region	Premises under lease by occupants		Percent of premises under lease by by occupants—Lease expires—		
	Number	Percent	Within 1 year	1 to 5 years	More than 5 years
United States total [1]	6,308	100	31.2	56.4	12.4
New England	540	100	22.0	60.4	17.6
Middle Atlantic	517	100	52.0	37.9	10.1
East north central	1,677	100	34.5	51.7	13.8
West north central	575	100	26.1	61.4	12.5
South Atlantic	248	100	27.4	59.3	13.3
East south central	86	100	33.7	55.8	10.5
West south central	389	100	35.0	54.2	10.8
Mountain	597	100	31.0	58.8	10.2
Pacific	1,679	100	25.7	63.2	11.1

[1] 34 States only. See pt. III, sec. I.

SECTION 2. WHOLESALE DISTRIBUTORS

OWNERSHIP VERSUS RENTAL OF PREMISES

Kind of business.—Approximately 56 percent of the reporting service-limited function wholesalers rent their premises. Some 93 percent of the wholesale jewelers rent. Other lines in which rental is more common include automotive supplies, clothing, and furnishings (except shoes), dry goods, electrical goods, fresh fruits and vegetables, furniture and house furnishings, beer, wines and liquors, machinery, equipment, and supplies (except electrical), paper and its products, and tobacco and its products.

TABLE 13.—*Wholesale establishments—Ownership versus rental of premises, June 1943*

[By kind of business]

Kind of business	Total number of establishments reporting		Percent of total number of premises	
	Number	Percent	Premises owned by occupants	Premises rented by occupants
United States total [1]	2,658	100	44.4	55.6
Automotive supplies	238	100	29.0	71.0
Clothing and Furnishings (except shoes)	54	100	18.5	81.5
Drugs and sundries	62	110	54.8	45.2
Dry goods	101	100	33.7	66.3
Electrical goods	139	100	25.9	74.1
Fresh fruits and vegetables	106	100	34.9	65.1
Furniture and house furnishings	68	100	39.7	60.3
Groceries and foods (except farm products)	564	100	58.9	41.1
Confectionery	44	100	56.8	43.2
Meats and meat products	60	100	56.7	43.3
Beer	78	100	42.3	37.7
Wines and liquors [2]	45	100	28.9	71.1
Hardware group	393	100	54.7	45.3
Jewelry	40	100	7.5	92.5
Lumber and building material	65	100	60.0	40.9
Machinery, equipment and supplies (except electrical)	74	100	31.1	68.9
Paper and its products	103	100	37.9	62.1
Tobacco and its products	143	100	37.1	62.9
3 other kinds of business not segregated	281	100	44.1	55.9

[1] 48 States. Pt. III, section II.
[2] "Wines and liquors" shows definite total only in New England and East North Central. All others in miscellaneous.

Business size.—The volume of sales has a more direct influence on wholesale tenancy than upon retail. Wholesalers, whose annual sales are less than the national average of approximately $200,000, are more likely to rent than are those of larger size. Only a little more than a third of the very large firms rent their business places.

TABLE 14.—*Wholesale establishments—Ownership versus rental of premises, June 1943*

[By business size]

Total annual sales, business size groups (based on 1939 sales)	Total number of establishments reporting		Percent of total number of premises	
	Number	Percent	Owned by occupants	Rented by occupants
United States total [1]	2,658	100	44.4	55.6
$2,000,000 and over	155	100	63.2	36.8
$1,000,000 to $1,999,999	292	100	51.0	49.0
$500,000 to $999,999	477	100	50.9	49.1
$300,000 to $499,999	445	100	47.7	52.3
$200,000 to $299,999	344	100	48.2	51.8
$100,000 to $199,999	475	100	36.2	63.8
$50,000 to $99,999	346	100	29.5	70.5
$10,000 to $49,999	121	100	31.4	68.6
Under $10,000	3	100		100.0

[1] 48 States. Pt. III. sec. II.

Geographical location.—On a geographical basis, the wholesale pattern of tenancy does not quite correspond with that for retailing. As in the retail field, the Pacific coast wholesalers have the highest proportion of renters, with New England close behind; but, contrary to the retail trends, rental is above the average, also, in the Middle Atlantic States and the east north-central region.

TABLE 15.—*Wholesale establishments—Ownership versus rental of premises, June 1943*

[By geographical location]

Region	Total number of establishments reporting		Percent of total number of premises	
	Number	Percent	Owned by occupants	Rented by occupants
United States total [1]	2,658	100	44.4	55.6
New England	169	100	38.5	61.5
Middle Atlantic	571	100	39.1	60.9
East north central	520	100	43.8	56.2
West north central	268	100	45.5	54.5
South Atlantic	390	100	49.7	50.3
East south central	159	100	49.1	50.9
West south central	187	100	54.5	45.5
Mountain	105	100	55.2	44.8
Pacific	289	100	38.1	61.9

[1] 48 States. Pt. III, sec. II.

PREVALENCE OF LEASES

Kind of business.—Two-thirds of the wholesalers who rent their premises have lease contracts. More than average use of these is

typical among wholesale distributors of clothing and furnishings, drugs and sundries, dry goods, furniture and house furnishings, wines and liquors, hardware, jewelry, lumber and building materials, machinery, equipment, and supplies, and paper and its products.

TABLE 16.—*Wholesale establishments—Prevalence of leases, June 1943*

[By kind of business]

Kind of business	Premises rented by occupants		Percent of total premises rented by occupants	
	Number	Percent	Without lease	With lease
United States total [1]	1,478	100	34.0	66.0
Automotive supplies	169	100	34.3	65.7
Clothing and furnishings (except shoes)	44	100	25.0	75.0
Drugs and sundries	28	100	32.1	67.9
Dry goods	67	100	23.9	76.1
Electrical goods	103	100	35.9	64.1
Fresh fruits and vegetables	69	100	56.5	43.5
Furniture and house furnishings	41	100	19.5	80.5
Groceries and foods (except farm products)	232	100	45.3	54.7
Confectionery	19	100	68.4	31.6
Meats and meat products	26	100	42.3	57.7
Beer	45	100	46.7	53.3
Wines and liquors	32	100	25.0	75.0
Hardware group	178	100	25.8	74.2
Jewelry	37	100	10.8	89.2
Lumber and building materials	26	100	15.4	84.6
Machinery, equipment and supplies (except electrical)	51	100	23.5	76.5
Paper and its products	64	100	12.5	87.5
Tobacco and its products	90	100	53.3	46.7
13 other kinds of business not segregated	157	100	28.7	71.3

[1] 48 States. Pt. III, sec. II.

Business size.—The percentage of renting wholesalers with leases varies directly with the size of business and ranges from 33 percent for the very small wholesalers to over 90 percent for the largest.

TABLE 17.—*Wholesale establishments—Prevalence of leases, June 1943*

[By business size]

Total annual sales, business size groups (based on 1939 sales)	Premises rented by occupants		Percent of total premises rented by occupants	
	Number	Percent	Without lease	With lease
United States total [1]	1,478	100	34.0	66.0
$2,000,000 and over	57	100	5.3	94.7
$1,000,000 to $1,999,999	143	100	17.5	82.5
$500,000 to $999,999	234	100	25.2	74.8
$300,000 to $499,999	233	100	33.5	66.5
$200,000 to $299,999	178	100	38.8	61.2
$100,000 to $199,999	303	100	41.3	58.7
$50,000 to $99,999	244	100	41.8	58.2
$10,000 to $49,999	83	100	48.2	51.8
Under $10,000	3	100	66.7	33.3

[1] 48 States. Pt. III, sec. II.

Geographical location.—The use of leases is most common in the Middle Atlantic States. However, the west north-central and east south-central regions also exceed the average. Wholesalers in New England are notably high among those who rent on a month-to-month basis.

TABLE 18.—*Wholesale distribution—Prevalence of leases, June 1943*

[By geographical location]

Region	Premises rented by occupants		Percent of total premises rented by occupants	
	Number	Percent	Without lease	With lease
United States total [1]	1,478	100	34.0	66.0
New England	104	100	55.8	44.2
Middle Atlantic	348	100	23.0	77.0
East north central	292	100	34.2	65.8
West north central	146	100	30.8	69.2
South Atlantic	196	100	39.8	60.2
East south central	81	100	30.9	69.1
West south central	85	100	34.1	65.9
Mountain	47	100	48.9	51.1
Pacific	179	100	36.3	63.7

[1] 48 States. Pt. III, sec. II.

EXPIRATION DATE OF EXISTING LEASES

Kind of business.—Some 39.8 percent of the premises under lease by wholesaler occupants face lease expiration within 1 year; 50.8 percent in from 1 to 5 years, and 9.4 percent not for more than 5 years. While slightly more than half of all kinds of wholesale establishments have leases that terminate within from 1 to 5 years, contracts expiring in less than a year are more common for automotive supplies, clothing, and furnishings (except shoes), fresh fruits and vegetables, furniture and house furnishings, and lumber and building materials.

TABLE 19.—*Wholesale establishments—Expiration date of existing leases, June 1943*

[By kind of business]

Kind of business	Premises under lease by occupants		Percent of premises under lease by occupants—Lease expires—		
	Number	Percent	Within 1 year	1 to 5 years	More than 5 years
United States total [1]	975	100	39.8	50.8	9.4
Automotive supplies	111	100	55.0	42.3	2.7
Clothing and furnishings (except shoes)	33	100	57.6	42.4	
Drugs and sundries	19	100	26.3	73.7	
Dry goods	51	100	45.1	43.1	11.8
Electrical goods	66	100	39.4	53.0	7.6
Fresh fruits and vegetables	30	100	56.7	36.7	6.6
Furniture and house furnishings	33	100	54.5	36.4	9.1
Groceries and foods (except farm products)	127	100	38.6	48.0	13.4
Confectionery	6	100	33.3	50.0	16.7
Meats and meat products	15	100	46.7	46.7	6.6
Beer	24	100	41.7	41.7	16.6
Wines and liquors	24	100	25.0	62.5	12.5
Hardware group	132	100	23.5	60.6	15.9
Jewelry	33	100	39.4	57.6	3.0
Lumber and building materials	22	100	59.1	27.3	13.6
Machinery, equipment and supplies (except electrical)	39	100	33.3	59.0	7.7
Paper and its products	56	100	30.4	55.3	14.3
Tobacco and its products	42	100	35.7	54.8	9.5
13 other kinds of business not segregated	112	100	38.4	55.4	6.2

[1] 48 States. Pt. III, sec. II.

Business size.—Wholesalers with large volume tend to have fewer leases running for less than 1 year (June 1943) and more in the 1- to 5-year class. On the other hand, among the small wholesale establishments nearly half of their leases expire within a year and very few are good for over 5 years. No special trend appears in the distribution of the long-term leases by business size.

TABLE 20.—*Wholesale establishments—Expiration date of existing leases, June 1943*

[By business size]

Total annual sales business size groups (based on 1939 sales)	Premises under lease by occupants		Percent of premises under lease by occupants—Lease expires—		
	Number	Percent	Within 1 year	1 to 5 years	More than 5 years
United States total [1]	975	100	39.8	50.8	9.4
$2,000,000 and over	54	100	29.6	59.3	11.1
$1,000,000 to $1,999,999	118	100	28.0	61.8	10.2
$500,000 to $999,999	175	100	33.7	52.6	13.7
$300,000 to $499,999	155	100	35.5	52.9	11.6
$200,000 to $299,999	109	100	41.3	50.5	8.2
$100,000 to $199,999	178	100	51.7	42.7	5.6
$50,000 to $99,999	142	100	45.1	48.6	6.3
$10,000 to $49,999	43	100	53.5	37.2	9.3
Under $10,000	1	100	100.0		

[1] 48 States. Pt. III, sec. II.

Geographical location.—More than half of the wholesalers in the Middle Atlantic States report leases expiring within 1 year. The percentages are identical on the Pacific coast for leases having less than a year to run and those running out in from 1 to 5 years. But in all other regions, 1- to 5-year expiration dates are most common.

TABLE 21.—*Wholesale establishments—Expiration date of existing leases, June 1943*

[By geographical location]

Region	Premises under lease by occupants		Percent of premises under lease by occupants—Lease expires—		
	Number	Percent	Within 1 year	1 to 5 years	More than 5 years
United States total [1]	975	100	39.8	50.8	9.4
New England	46	100	21.7	65.2	13.1
Middle Atlantic	268	100	53.4	39.2	7.4
East north central	192	100	36.5	54.1	9.4
West north central	101	100	24.8	71.3	3.9
South Atlantic	118	100	40.7	49.2	10.1
East south central	56	100	39.3	50.0	10.7
West south central	56	100	25.0	57.1	17.9
Mountain	24	100	20.8	62.5	16.7
Pacific	114	100	44.7	44.7	10.6

[1] 48 States. Pt. III, sec. II.

PART III

APPENDIX A

THE PROCEDURE

After the Senate Small Business Committee had requested that the Department of Commerce gather information on the tenure of business leases, it was decided that the Bureau of the Census should gather and compile the material on independent retailers and wholesaler distributors. It was not found practicable to make a similar survey on concerns engaged in manufacturing or rendering service.

Make-up of the sample.—Through the current reporting service of the Bureau of the Census, samples of wholesale and independent retail concerns have been built up over a period of years. Questionnaires were sent to approximately 30,000 independent retail establishments in 34 States. Of these, 20,742 or 69 percent of the returns were usable. Approximately 3,500 wholesalers in all 48 States were addressed, and 2,658 or 75.9 percent returned usable data. The sample of wholesalers was confined to service and limited-function wholesalers and included both individual and multiple unit organizations. It did not include specialized wholesale types—such as manufacturers' sales branches, bulk tank stations, or agents and brokers.

The 34 States represented in the sample of retailers are:

New England—Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, and Connecticut.

Middle Atlantic—Pennsylvania.

East North Central—Ohio, Indiana, Illinois, Michigan, and Wisconsin.

West North Central—Iowa, Missouri, Nebraska, and Kansas.

South Atlantic—South Carolina, Georgia, and Florida.

East South Central—Alabama.

West South Central—Arkansas, Oklahoma, and Texas.

Mountain—Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, and Nevada.

Pacific—Washington, Oregon, and California.

Explanation and character of the data.—The questionnaires presented to the wholesale and independent retail concerns were simple. Consisting of three brief questions, they sought the following information: (*a*) To indicate whether the various establishments owned or rented their business premises; (*b*) if rented, whether they had leases; and (*c*) if they had leases, whether the leases would expire within a year (before June 1, 1944); between June 1, 1944, and May 31, 1949; or after June 1, 1949. The questionnaires were mailed from and returned to the Bureau of the Census, which agency also compiled the results.

Replies were classified by kinds of business, by size of city in which they were located, by size of business, and by geographical location. This was done to discover what relationship, if any, these factors had to ownership, possession of a lease, and term of the lease. Wholesale establishments were not segregated by size of city. Tables containing the numerical results will be found in appendix B.

APPENDIX B

GENERAL TABLES

The tables which follow show the numerical totals in each of the various classifications and are the basic data from which the percentages in the text tables are derived:

TABLE A.—*Independent retail establishments—Segregated by kinds of business, June 1943*

Kind of business	Total number of establishments reporting	Total number of establishments reporting						
		Premises owned by occupants	Premises rented by occupants	Without lease	With lease	Lease expires—		
						Within 1 year	1 to 5 years	More than 5 years
United States total [1]	20,742	8,636	12,106	5,798	6,308	1,966	3,561	781
Department stores	228	70	158	10	148	11	70	67
Food group	4,425	2,183	2,242	1,462	780	289	425	66
Eating and drinking places	1,604	449	1,155	402	753	252	419	82
General stores	1,550	1,123	427	319	108	32	55	21
Liquor stores	233	67	166	91	75	29	44	2
Florists	206	85	121	60	61	25	34	2
Filling stations	683	309	374	111	263	123	105	35
Farm and garden supply	125	80	45	24	21	7	12	2
Drug stores	2,548	697	1,851	852	999	248	627	124
Dry goods and general merchandise	606	265	341	182	159	47	93	19
Apparel group	2,217	388	1,829	591	1,238	301	759	178
Sporting goods stores	96	19	77	32	45	10	31	4
Jewelry stores	704	149	555	237	318	112	174	32
Automotive group	1,288	528	760	359	401	176	197	28
Furniture-household-radio group	1,166	431	735	382	353	109	205	39
Lumber-building-hardware group	2,756	1,671	1,085	599	486	158	258	70
Other kinds of business not segregated	307	122	185	85	100	37	53	10

[1] 34 States only. See pt. III, sec. 1.

TABLE B.—*Independent retail establishments—Segregated by city size, June 1943*

Size of city (based on 1940 population)	Total number of establishments reporting	Total number of establishments reporting						
		Premises owned by occupants	Premises rented by occupants	Without lease	With lease	Lease expires—		
						Within 1 year	1 to 5 years	More than 5 years
United States total [1]	20,742	8,636	12,106	5,798	6,308	1,966	3,561	781
500,000 or more	2,427	745	1,682	528	1,154	454	595	105
100,000 to 500,000	3,110	912	2,198	1,081	1,117	332	620	165
10,000 to 100,000	6,923	2,457	4,466	1,859	2,607	741	1,528	338
Less than 10,000	8,282	4,522	3,760	2,330	1,430	439	818	173

[1] 34 States only. See pt. III, sec. 1.

TABLE C.—*Independent retail establishments—Segregated by business size, June 1943*

Total annual sales business size groups (based on 1939 sales)	Total number of establishments reporting	Total number of establishments reporting						
		Premises owned by occupants	Premises rented by occupants	Without lease	With lease	Lease expires—		
						Within 1 year	1 to 5 years	More than 5 years
United States total [1]	20,742	8,636	12,106	5,798	6,308	1,966	3,561	781
$1,000,000 and over	132	47	85	10	75	14	32	29
$500,000 to $999,999	330	109	221	38	183	49	91	43
$300,000 to $499,999	508	195	313	80	233	61	114	58
$200,000 to $299,999	613	277	336	102	234	57	127	50
$100,000 to $199,999	1,849	816	1,033	307	726	149	443	134
$50,000 to $99,999	3,575	1,466	2,109	760	1,349	345	820	184
$30,000 to $49,999	3,848	1,443	2,405	1,085	1,320	403	788	129
$20,000 to $29,999	3,180	1,211	1,969	1,012	957	336	537	84
$10,000 to $19,999	4,110	1,734	2,376	1,482	894	382	459	53
Under $10,000	2,597	1,338	1,259	922	337	170	150	17

[1] 34 States only. See pt. III, sec. 1.

TABLE D.—*Independent retail establishments—Segregated by geographical location, June 1943*

Region	Total number of establishments reporting	Total number of establishments reporting						
		Premises owned by occupants	Premises rented by occupants	Without lease	With lease	Lease expires—		
						Within 1 year	1 to 5 years	More than 5 years
Total of sample [1]	20,742	8,636	12,106	5,798	6,308	1,966	3,561	781
New England	2,255	900	1,355	815	540	119	326	95
Middle Atlantic	1,722	994	728	211	517	269	196	52
East North Central	5,538	2,466	3,072	1,395	1,677	579	867	231
West North Central	2,252	988	1,264	689	575	150	353	72
South Atlantic	800	281	519	271	248	68	147	33
East South Central	239	98	141	55	86	29	48	9
West South Central	1,483	644	839	450	389	136	211	42
Mountain	2,086	850	1,236	639	597	185	351	61
Pacific	4,367	1,415	2,952	1,273	1,679	431	1,062	186

[1] 34 States only. See pt. III, sec. 1.

TABLE E.—*Wholesale establishments—Segregated by kinds of business, June 1943*

Kind of business	Total number of establishments reporting	Total number of establishments reporting						
		Premises owned by occupants	Premises rented by occupants	Without lease	With lease	Lease expires—		
						Within 1 year	1 to 5 years	More than 5 years
United States total [1]	2,658	1,180	1,478	503	975	388	495	92
Automotive supplies	238	69	169	58	111	61	47	3
Clothing and furnishings (except shoes)	54	10	44	11	33	19	14	
Drugs and sundries	62	34	28	9	19	5	14	
Dry goods	101	34	67	16	51	23	22	6
Electrical goods	139	36	103	37	66	26	35	5
Fresh fruits and vegetables	106	37	69	39	30	17	11	2
Furniture and home furnishings	68	27	41	8	33	18	12	3
Groceries and foods (except farm products)	564	332	232	105	127	49	61	17
Confectionery	44	25	19	13	6	2	3	1
Meats and meat products	60	34	26	11	15	7	7	1
Beer	78	33	45	21	24	10	10	4
Wines and liquors	45	13	32	8	24	6	15	3
Hardware group	393	215	178	46	132	31	80	21
Jewelry	40	3	37	4	33	13	19	1
Lumber and building material	65	39	26	4	22	13	6	3
Machinery, equipment and supplies (except electrical)	74	23	51	12	39	13	23	3
Paper and its products	103	39	64	8	56	17	31	8
Tobacco and its products	143	53	90	48	42	15	23	4
Other kinds of business not segregated	281	124	157	45	112	43	62	7

[1] 48 States.

TABLE F.—*Wholesale establishments—Segregated by business size, June 1943*

Total annual sales business size groups (based on 1939 sales)	Total number of establishments reporting	Total number of establishments reporting						
		Premises owned by occupants	Premises rented by occupants	Without lease	With lease	Lease expires—		
						Within 1 year	1 to 5 years	More than 5 years
United States total [1]	2,658	1,180	1,478	503	975	388	495	92
$2,000,000 and over	155	98	57	3	54	16	32	6
$1,000,000 to $1,999,999	292	149	143	25	118	33	73	12
$500,000 to $999,999	477	243	234	59	175	59	92	24
$300,000 to $499,999	445	212	233	78	155	55	82	18
$200,000 to $299,999	344	166	178	69	109	45	55	9
$100,000 to $199,999	475	172	303	125	178	92	76	10
$50,000 to $99,999	346	102	244	102	142	64	69	9
$10,000 to $49,999	121	38	83	40	43	23	16	4
Under $10,000	3		3	2	1	1		

[1] 48 States.

TABLE G.—*Wholesale establishments—Segregated by geographical location, June 1943*

Region	Total number of establishments reporting	Total number of establishments reporting						
		Premises owned by occupants	Premises rented by occupants	Without lease	With lease	Lease expires—		
						Within 1 year	1 to 5 years	More than 5 years
United States total [1]	2,658	1,180	1,478	503	975	388	495	92
New England	169	65	104	58	46	10	30	6
Middle Atlantic	571	223	348	80	268	143	105	20
East North Central	520	228	292	100	192	70	104	18
West North Central	268	122	146	45	101	25	72	4
South Atlantic	390	194	196	78	118	48	58	12
East South Central	159	78	81	25	56	22	28	6
West South Central	187	102	85	29	56	14	32	10
Mountain	105	58	47	23	24	5	15	4
Pacific	289	110	179	65	114	51	51	12

[1] 48 States.

HOW BUREAU OF FOREIGN AND DOMESTIC COMMERCE SERVES BUSINESS

In carrying out its statutory functions—to foster, promote, and develop the foreign and domestic commerce of the United States—the Bureau of Foreign and Domestic Commerce serves all segments of business. Possessing no regulatory powers it can take an objective view and devote all its energies to gathering facts and providing practical aids to private enterprisers.

The Bureau's methods of reaching the business public is through published information, and personal contact which is largely maintained by the Department of Commerce field offices.

A few examples of available printed material are described briefly below:

PERIODICALS

Domestic Commerce is a printed monthly magazine which serves as the medium through which all Department of Commerce Bureaus channel news of special activities and research designed to help businessmen. In addition to special articles covering a wide range of subjects, regular features include—business trends; trade association news; reports on books.

Survey of Current Business is recognized as an authoritative textbook for all those engaged in business and economic research. A monthly magazine, it contains approximately 2,400 series of business facts. Among them are the latest statistics on construction and real estate as well as wholesale and retail trade.

Foreign Commerce Weekly provides all those interested in international trade with detailed reports on the economic conditions in foreign countries.

Annual subscriptions to the above publications should be entered with the Superintendent of Documents, Government Printing Office, Washington 25, D. C.:

	Per annum
Domestic Commerce	$1.00
Survey of Current Business	1.75
Foreign Commerce Weekly	4.50

REPORTS

Recent studies of particular interest to small business are available at no cost, from Department of Commerce field offices listed in the back of the booklet, and include:

Small Retail Store Mortality. Results of a survey among 149 retailers who discontinued business during the war period and of 83 who recently opened new stores. The circumstances surrounding the withdrawals and motives for entering retailing at this time are analyzed.

Distribution of Scarce Goods. This is a report on the methods used by manufacturers and wholesalers in meeting the wartime problems of distributing scarce consumer goods to their customers. It contains also a discussion of alternative policies in respect to the problem of fair distribution of goods.

Effective Grocery Wholesaling. Discusses the far-reaching changes that have taken place in the wholesale grocery trade. The material is based on case studies of operating methods of a carefully selected group of successful wholesale grocery houses distributed geographically throughout the country.

Record Keeping for Small Stores. A simplified exposition for the small store owner on the value of keeping records and how they can be used from a management point of view.

Wartime Guide for Retail Grocers. Describes everyday store economies recommended under present conditions and various merchandising adjustments necessary under wartime conditions. Similar booklets will be available shortly on drug and drygoods stores.

Controlling Mark-Downs in Retail Stores. Covers mark-down history in a representative sample of department stores, 1929 to 1943. It analyzes the nature, causes and extent of mark-downs and points the way to establishing control methods by individual stores.

Wholesale Warehousing Routines. Studies and diagrams for building new grocery warehouses and remodeling old multistory type in order to achieve the most effective applications of modern warehousing and order-filling techniques.

Post-War Problems of Wholesalers. Prepared for the Council of National Wholesale Associations, this analysis of current trends and future problems of various types of wholesalers is designed to aid individual wholesalers in adjusting their operations to post-war conditions.

Residential Building Study. Offers an improved means of measuring the place of residential repair and maintenance in the national economy. It also serves as a guide to the extent, character, and location of the market for building materials and specialists, and to the amount of labor represented annually in repair and maintenance of the country's 40 million-odd dwellings.

Plumbing and Heating—a Statistical Handbook. Contains statistics for a period of years on various aspects of the plumbing and heating industry. It covers such subjects as—production, housing, condition of plumbing and heating facilities, wholesale prices, and projections of production at various levels of the gross national product.

Shifts in Population, Production, and Markets. A statistical study on a regional basis for the year 1939–43, prepared in answer to the growing need for authentic information on the wartime changes in the economic map of the United States.

Regional Economic Conditions. On the staff of each of the 12 regional field offices is a business consultant. Among their duties is the preparation of quarterly reports on carefully selected subjects. Thus, a Nation-wide picture is gained of various phases of the business economy. During 1943, reports covered—the impact of the war on business, transportation situation, small business views of its future, and post-war plans by business.

As a pioneer in the study of anticipated problems in the reconversion period, the Bureau has made significant contributions to help business bridge the gap of the coming transition period. For instance:

Markets After the War has served as a guide for associations, business groups, and individual businessmen in studying their future

business. An exhaustive study on the post-war market possibilities, it is a projection based on the premise that we must have a high level of productive employment.

Market Prospects After the War is a compilation of reprints appearing in Domestic Commerce which cover the post-war outlook for specific industries. Among them are—Housing Appraised for Post-War Era, and Peacetime View of Building Industry.

Community Action for Post-War JOBS AND PROFITS is designed for use by moderate-sized communities to prepare now for a healthy business future. Calls for aggressive leadershiip by local chamber of commerce or other business organizations.

HOW DEPARTMENT OF COMMERCE FIELD OFFICES SERVE BUSINESS

In each of the Department of Commerce field offices are highly trained, thoroughly experienced men and women. In addition to giving advice and counsel to the businessmen of their areas, they act as liaison for the Department of Commerce and its Bureaus, and the Foreign Service of the State Department.

Each field office maintains a library of Department of Commerce and other Government publications, and to meet the growing demand for information of post-war planning, special files are kept on this subject.

Also, of special interest to businessmen are statistics gathered by the Bureau of the Census, which are available from each of the 26 field offices. Among these, the Business Census are particularly valuable. These include:

Retail Trade. Analyses of all angles of retail trade, including commodity sales by kinds of business.

Wholesale Trade. Basic statistics by kinds of business and types of operation.

Service Establishments. Basic facts and analytical data for service establishments.

Manufacturing. Comprehensive data on manufacturing, broken down by industrial groups.

Population. Number of inhabitants by States, counties, and many smaller divisions classified by characteristics.

Housing. Statistics on type, material and age of structure and many other details.

Statistical Abstract of the United States. The 1942 edition of this annual volume compiled by the Bureau of the Census provides authoritative statistics on the social and economic condition of the population and on the industrial, commercial, and governmental activities of the Nation.

Special Field Office Publications. A Regional Commerce Bulletin is issued bimonthly by regional field offices, in which important business developments, new publications, and report of the Department of Commerce are reported. Foreign Commerce News Bulletin is a weekly letter giving changing regulations, tariffs, and other important foreign trade facts.

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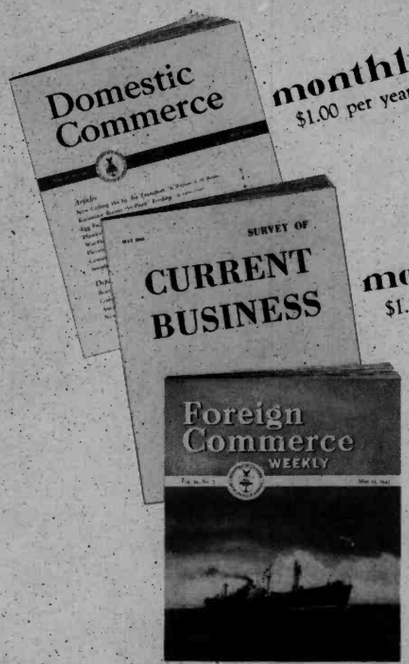

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